

Message Text

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FM SECSTATE WASHDC

TO AMEMBASSY THE HAGUE

INFO AMCONSUL ROTTERDAM

AMCONSUL AMSTERDAM

UNCLAS STATE 219407

E.O. 11652: N/A

TAGS: BEXP, BFOL, NL

SUBJ: GLOBAL MARKET RESEARCH: FOOD PROCESSING AND
PACKAGING EQUIPMENT-THE NETHERLANDS

REF: STATE A-1665

1. MARKET RESEARCH DIVISION (MRD) HAS REVIEWED REPORT
PREPARED BY N.V. V/H NEDERLANDSE STICHTING VOOR STATISTIEK
(NSS) AND FOUND CONTRACTOR HAS NOT SATISFIED RESEARCH
SPECIFICATIONS. REPORT OMITTS MUCH REQUIRED INFORMATION,
CONTAINS SEVERAL DISCREPANCIES AND APPARENT STATISTICAL
ERRORS, AND DOES NOT FOLLOW SPECIFIED FORMAT.

2. ACTION REQUESTED

TRANSMIT COPY FOLLOWING ANALYSIS OF REPORT TO NSS SOONEST
AND OBTAIN COMMITMENT THAT THEY WILL SUBMIT INFORMATION
REQUIRED TO AMEMBASSY BY OCT 25.

3. FINAL PAYMENT TO CONTRACTOR WILL BE APPROVED UPON
RECEIPT AND ACCEPTANCE BY COMMERCE OF SUPPLEMENTARY
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INFORMATION REQUESTED IN ANALYSIS.

4. ANALYSIS OF NSS REPORT (FOR CONTRACTOR)

THIS ANALYSIS IS ORGANIZED IN ACCORDANCE WITH SEQUENCE OF MARKET RESEARCH SPECIFICATIONS. ADDITIONAL INFORMATION OR CLARIFICATION REQUIRED IS SUMMARIZED UNDER APPROPRIATE SECTION NUMBER. PARENTHETICAL PAGE REFERENCES APPLY TO CONTRACTOR'S REPORT.

1.24.05

PROVIDE COMPLETE NAMES OF COMPANIES WHERE SUCH NAMES APPEAR INITIALLY IN REPORT (PP. 45-78), E.G., CITE FULL NAMES "ALFA LAVAL AB", APV CO. LTD.", ETC.

3.21.05

INFORMATION GIVEN (PP. 26-27) CONCERNS REFRIGERATING EQUIPMENT. PROVIDE INFORMATION ON QUICK-FREEZING EQUIPMENT SALES, AS REQUIRED.

3.23.01 (E)

PROVIDE REQUIRED INFORMATION. EXPLANATION GIVEN FOR ITS OMISSION (P. 39) UNSATISFACTORY.

N

3.23.01 (F)

PROVIDE COMPLETE, SEPARATE LIST OF NAMES AND NATIONALITIES OF IMPORTANT THIRD-COUNTRY SUPPLIERS THAT ARE REPRESENTED IN THE MARKET, IN LINE-BY-LINE ORDER, TO REPLACE LISTS GIVEN IN INDUSTRY SECTOR PROFILES, WHICH ARE EXTREMELY CONFUSING. THEY GIVEN INCOMPLETE COMPANY NAMES, FOLLOWED IN SOME INSTANCES BY CITY NAMES AND/OR COUNTRY NAMES AND IN OTHER INSTANCES WITH NO IDENTITY OF NATIONALITY, FOLLOWED BY NEXT INCOMPLETE COMPANY NAME, ETC. IN ADDITION, LISTS GIVEN PERTAIN TO ONLY PART OF THE MARKET; THEY EXCLUDE SUPPLIERS TO THE FIVE LESS IMPORTANT SECTORS.

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3.24

PROVIDE REQUIRED LISTS, PER INSTRUCTIONS GIVEN IN RESEARCH SPECIFICATIONS. SLIGHT INFORMATION GIVEN IN INDUSTRY SECTOR PROFILES UNACCEPTABLE.

3.31.01 (A)

ANALYSIS DATA GIVEN IN TABLE 14 KP. 41) REVEALS THAT
NUMBER OF ESTABLISHMENTS BY SECTOR TOTAL 1,373 WHILE
NUMBER OF ESTABLISHMENTS BY NUMBER OF EMPLOYEES TOTAL
1,835. PROVIDE EXPLANATION FOR DISCREPANCY, OR REVISE
FIGURES.

3.31.01 (B)

PROVIDE FIGURES ON QUANTITY OF PRODUCTION BY EACH OF
THE FOOD PROCESSING INDUSTRY SECTORS, AS REQUIRED. THIS
DATA IS AVAILABLE IN C.B.S. PUBLICATIONS.

PROVIDE EXPLANATION OF CAUSE OF "DOUBLE COUNTS" MENTIONED
IN FOOTNOTE 3 TO TABLE 15 (P. 42). IN WHAT SECTORS
DOES THIS OCCUR? IS THE AMOUNT DOUBLE-COUNTED SIGNIFICANT
OR INSIGNIFICANT?

TOTAL OF 1971 SALES FIGURES (INCLUDING DOUBLE-COUNTS)
GIVEN IN TABLE 15 AMOUNTS TO DOL 1.7 BILLION. CONSIDERING SIZE
OF DUTCH MARKET FOR FPP EQUIPMENT (DOL 123 MILLION IN 1971)
AND TOTAL CAPITAL EXPENDITURES BY FOOD PROCESSING INDUSTRY
(DOL 256 MILLION IN 1971), VALUE OF SALES BY THE INDUSTRY
OF DOL 1.7 BILLION APPEAR UNUSUALLY LOW. INDICATE WHETHER
SALES FIGURES GIVEN ARE, IN FACT, SALES BY MANUFACTURING
ESTABLISHMENTS. IF SO, REVIEW FIGURES FOR STATISTICAL
ERRORS. IN ADDITION, PROVIDE COMPLETE INFORMATION ON SOURCE
FOR DATA GIVEN (I.E., NAME AND DATE OF C.B.S. PUBLICATION).

INDICATE WHETHER DATA GIVEN FOR SUGAR AND CONFECTIONERY
SECTOR IN TABLE 16 (P. 43) IS LIMITED TO JUST THE CONFECTIONERY
PORTION OF THE SECTOR, AS APPEARS EVIDENT BY CONTENT OF
FOOTNOTE 1 TO THE TABLE. IF IT IS NOT, INDICATE WHAT
PROPORTIONS OF DATA GIVEN FOR THE SECTOR ARE ACCOUNTED FOR
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BY THE SUGAR PROCESSING INDUSTRY.

3.31.01 (C)

PROVIDE COMPLETE, SEPARATE LIST OF NAMES AND NATIONALITIES
OF LEADING EQUIPMENT SUPPLIERS TO EACH OF THE TEN SECTORS,
AS REQUIRED. LISTS GIVEN (PP. 45-48 AND IN INDUSTRY SECTOR
PROFILES) UNACCEPTABLE, AS NATIONALITY IS SOMETIMES OMITTED
AND FULL COMPANY NAMES ARE NOT GIVEN, ETC.

3.31.02 (A)

PROVIDE REQUIRED INFORMATION.

3.31.02 (B)

PROVIDE REQUIRED INFORMATION.

3.32

PROVIDE EXPLANATION FOR VAST DIFFERENCE BETWEEN 1971
TOTAL OUTPUT BY DAIRY SECTOR OF DOL 1.6 BILLION (P. 49) AND 1971
SALES BY DAIRY SECTOR OF DOL 385.5 MILLION (P. 42).

3.32.01 (A)

PROVIDE FIGURES ON QUANTITY OF BEER, WINE, SPIRITS, AND
SOFT DRINK PRODUCTION. PROVIDE FIGURES ON QUANTITY OF
BREAD PRODUCTION.

3.32.01 (B)

LIST NAMES OF PRINCIPAL MANUFACTURERS OF SPIRITS/ALCOHOL.
PROVIDE NAMES OF "4 OR 5 INDUSTRIAL BAKERIES WITH NATION-WIDE
ACTIVITIES". (P. 66).

3.32.01 (C)

PROVIDE DEFINITION OF "LARGE FIRMS" (LINE 1, P. 50).
INDICATE APPROXIMATE PERCENTAGE OF TOTAL SALES OF
SPIRITS/ALCOHOL ACCOUNTED FOR BY LARGE ENTERPRISES.
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3.32.01 (D)

PROVIDE EXPLANATION FOR DISCREPANCY BETWEEN TOTAL
INVESTMENT VALUES GIVEN IN MEAT PROCESSING SECTOR PROFILE
(P. 55) AND THOSE GIVEN IN TABLE 16 (P. 43), FOR YEARS
1970 THROUGH 1973.

3.32.01 (E)

PROVIDE ALL REQUIRED DETAILS CONCERNING PLANS FOR
CONSTRUCTION OF BRED-ORANJEBOOM DISTILLERY (P. 61), AND
IGLO PLANT, GROKO PLANT UND DE BETUWE PLANT (P. 74).

3.32.01 (G)

PROVIDE REQUIRED INFORMATION FOR DAIRY, BEVERAGES, AND
FRUIT AND VEGETABLE SECTORS.

3.33.01 (A)

INDICATE WHETHER MELK-UNIE PLANT PROFILED (P. 51) IS OWNED

BY NEDERLANDSE MELKUNIE (P. 49). PROVIDE CORRECT SPELLING OF FIRM.

3.33.01 (B)

SPECIFY WHETHER "THROUGHPUT 500 MILLION LITRES" (LINE 9, P. 51) AND "15,000 AND 20,000 TONS OUTPUT" (LINE 7, P. 57) REPRESENT ANNUAL CAPACITIES, OR CAPACITY BASED ON OTHER TIME-FRAMES.

3.33.01 (A), (B) AND (C)

PROVIDE REQUIRED INFORMATION FOR BEVERAGES, BAKERY, AND FRUIT AND VEGETABLE SECTORS. INFORMATION GIVEN (PP. 64-65, 69-71, 75) UNSATISFACTORY.

3.40.01 (A)

INDICATE NUMBER OF FIRMS PRODUCING FOOD PROCESSING UNCLASSIFIED

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EQUIPMENT AND NUMBER PRODUCING FOOD PACKAGING EQUIPMENT.

3.40.01 (B)

COMMERCE DID NOT RECEIVE BOOKLET "DUTCH EQUIPMENT FOR THE FOOD AND ALLIED INDUSTRIES" REFERRED TO (P. 76). PLEASE PROVIDE COPY.

3.40.01 (D)

DISCUSS RELATIVE IMPORTANCE AND POSITION OF NATIONAL (I.E., LOCALLY-OWNED) MANUFACTURERS IN THE INDUSTRY.

3.40.01 (F)

DISCUSS PROSPECTS FOR GROWTH OF DOMESTIC FPP EQUIPMENT MANUFACTURING INDUSTRY. KISSINGER

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